Task Order 75 - Data Mart Operations

Data Mart Operations Monthly SLA Metrics Report
Deliverable 75.1.3b

Period Ending: 11/30/01

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Introduction

This is the sixth monthly report for Task Order 75 Data Mart Operations. The purpose of this task order is to provide the capability to sustain the CFO and FP Data Marts. The report information will be provided separately for each system.

Data Mart Availability

Date	Availability (%)	Notes
Thu - November 1	70%	Applications can't be reached through DoE network. Server was restarted.
Fri - November 2	100%	
Sat - November 3	100%	
Sun - November 4	100%	
Mon - November 5	100%	
Tue - November 6	100%	
Wed - November 7	100%	
Thu - November 8	100%	
Fri - November 9	100%	
Sat - November 10	100%	
Sun - November 11	100%	
Mon - November 12	100%	
Tue - November 13	100%	
Wed - November 14	100%	
Thu - November 15	100%	
Fri - November 16	100%	
Sat - November 17	100%	
Sun - November 18	100%	
Mon - November 19	100%	
Tue - November 20	100%	
Wed - November 21	100%	
Thu - November 22	100%	
Fri - November 23	100%	
Sat - November 24	100%	
Sun - November 25	100%	
Mon - November 26	100%	
Tue - November 27	100%	
Wed - November 28	100%	
Thu - November 29	100%	
Fri - November 30	100%	

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CFO Data Mart Operations Status

Work Accomplished During This Period

- Provided daily monitoring of CFO data mart file loads.
- Provided daily monitoring of CFO data mart availability.
- Continued tracking SIRs and production support requests.
- Documented the FTP Process for CFO Data mart and reviewed with CFO Budget Users.
- Completed critical CFO report and ETL in the development environment.
- Created production migration plan to move new reports and ETL for the CFO data mart into the production environment.
- Completed knowledge transfer for the data mart configuration management.

Issues or Anticipated/Current Problems

- none

Planned Work for Next Period

- Continue tracking database updates.
- Continue daily monitoring of CFO data mart file loads.
- Continue daily monitoring of CFO data mart availability.
- Continue tracking SIRs and production support requests.
- CFO Production Migration
- CFO User Acceptance in Production

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Batch Job Results (CFO)

Date Processed	Number of Rows Processed	Notes
Thu - November 1	63,298	
Fri - November 2	59,752	
Sat - November 3	58,104	
Sun - November 4		
Mon - November 5	58,104	
Tue - November 6	4,694	
Wed - November 7	2,132	
Thu - November 8	1,688	
Fri - November 9	1,130	
Sat - November 10	1,796	
Sun - November 11		
Mon - November 12	0	Confirmed zero records with Michelle Briscoe
Tue - November 13	0	Log file and database confirm zero records for day
Wed - November 14	89,522	
Thu - November 15	0	
Fri - November 16	5,870	
Sat - November 17	4,804	
Sun - November 18		
Mon - November 19	4,804	
Tue - November 20	79,536	
Wed - November 21	2,138	
Thu - November 22	1,244	
Fri - November 23	0	No Load- Thanksgiving Day
Sat - November 24	892	
Sun - November 25		
Mon - November 26	0	Confirmed zero records with Michelle Briscoe- No data for Thanksgiving holiday weekend.
Tue - November 27	800	
Wed - November 28	3,252	
Thu - November 29	38,672	
Fri - November 30	1,704	

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Help Desk Monthly Throughput (CFO)

User Support

Category	High	Medium	Low	Total
Carry Forward	0	0	0	**0**
New	1	0	0	**1**
Closed	0	0	0	**0**
End of Month Balance	**1**	**0**	**0**	1

Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	1	0	2	**3**
New	0	0	0	**0**
Closed	0	0	0	**0**
End of Month Balance	**1**	**0**	**2**	3

Help Desk Request Summary (CFO)

Total Records: 4

ID	Status	Request Type	Title	Priority	DateOpened	DateClosed
194	Open	Enhancement	Automate process of modifying and adding descriptions	High	8/15/2001	
153	Open	Enhancement	New Monthly Report- Status of Funds Report	Low	7/20/01	
163	Open	Enhancement	File Layout Change	Low	7/25/01	
284	Open	User Support	Missing Dmp Files	High	11/26/01	

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Help Desk Request Details (CFO)

Total Records: 4

ID: 153 **-** New Monthly Report - Status of Funds Report

Request	Enhancement	**Priority** Low		**Assigned**	Robert Audet
Open Date:	7/20/2001 10:00:00 AM	**Requestor** David Pappone			
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:** CFO DataMart			

Description

 I generate the Status of Funds report for SFA each month based on data mart data. However, with the way the data comes off the data mart, it takes two days for me to put it in the format I need it. I think (using custom groups and consolidations) this report can be made to run itself, thereby saving me days worth of work every month. Jeff was helping me with a report during the last couple days he was here, but we didn't get very far. I need assistance in creating this report.

Resolution:

Activity

7/25/2001 (David Pappone) Currently, I compile two reports each month. The Summary Status of Funds report and the Detail Status of Funds report. While the data mart has made it easier to run these reports than in the past, there is still considerable room for improvement. Currently, the Detail report takes at least 2 full days to prepare. It is my belief that through enhanced reports using Microstrategy Desktop, the currently two day report could be run virtually at the click of a button. A report directly from the Data Mart, in addition to saving time, would also be more accurate than a report that requires two days of manipulation in MS Excel. Jeff Scudder and I were working on this report before he left, but more work is required.

8/3/01 (Mark Mandrella): Called Dave Pappone and set up a meeting to further discuss the requirements for this report. The meeting is scheduled for 8/6/01 at 1:00 on ROB3-4642.

9/28/2001 (Keisha Contee) Annie will meet with David Pappone to discuss the requirements for this report on Tuesday, October 2, 2001.

10/12/2001 (Keisha Contee) Annie has met w/ David and gathered requirements. Keisha is working on a required table that is needed for the report.

11/26/01 (Bob Audet) Provided new reports to the David Pappone and Russell Young to review. Awaiting their feedback.

11/26/01 (Bob Audet) Waiting for feedback from David and Russell on these reports.

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11/30/01 (Bob Audet) Meeting with David Pappone this afternoon to discuss feedback from his boss.

ID: 163   -   File Layout change

Request	Enhancement	**Priority** Low		**Assigned**	Robert Audet
Open Date:	7/25/2001 3:15:00 PM	**Requestor** Russell Young			
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:** CFO DataMart			

Description

Sometime in the mid August timeframe, the Mod Partner - CIO will be moving the Informatica applications from a Sun server to an HP server. The Mod Partner - CIO is planning this effort and will be the main group responsible for it. We will have to test to verify that our processes are still working appropriately. Their current plan is to have the HP environment up so that we can 'run in parallel' (this does NOT mean that we will be updating the data base twice) and verify that the process works appropriately prior to turning off the Sun server.

The Informatica resource who originally installed the product will be back to re-install it on the HP server. In addition, Chirayu Patel, who developed the Informatica processes for both the CFO and FP data marts, will be back to help verify and test the application on the HP server.

Resolution:

Activity

7/25/2001 (Russell Young) At some point we need to contact the Ed's CFO to see if their new system will change the file we will receive after September 30. This file update process is part of the maintenance Task Order. If you going to have the Informatica people in can we build some time in their schedule to work on this. I guess we need first to talk to ED CFO about this.

7/25/2001 (Nancy Krecklow) Thanks for the heads up on the potential file layout change. When Tom returns next week he will need to set up a meeting with you to discuss this further (Anna McDonald probably needs to be involved in this meeting). If the file layout will change effective Oct 1st, we need time to make sure that we have the proper Informatica process in place to accept the new layout.

7/27/2001 (Keisha Contee) Will contact Russ Young to set up a meeting to discuss the issue further.

7/31/2001 (Keisha Contee) Set up meeting on August 7 to discuss issues.

8/7/2001(Keisha Contee) Nancy and I decided to cancell the meeting because Anna MacDonald would not be availale. Meeting will be scheduled for sometime next week.

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8/27/2001 (Keisha Contee) The meeting was rescheduled for August 29

8/29/2001(Keisha Contee) The meeting was cancelled because key players would not be able to attend. I found that Anna is not the lead for this effort. The lead is James Perry. I have sent him an email requesting his assistance, but he has yet to respond.

9/11/2001(Keisha Contee) Spoke with Russell Young said the Oracle Financials extract may not be implemented until January 1, 2002. Therefore, this issue has taken low priority. Russelll will be our point of contact for this issue.

ID: 194 **-** Automate process of modifying and adding descriptions

Request Type: Enhancement	**Priority** High	**Assigned**	Robert Audet
Open Date: 8/15/2001 8:00:00 AM	**Requestor** Russell Young		
Target Date: 10/15/2001	**Estimated Effort** 0		
Closed	**ApplicationType:** CFO DataMart		
Description			

There is currently no process to update or add new descriptions to to the data mart.
Resolution:

Activity

8/15/2001 (Keisha Contee) Chirayu, Annie, and Keisha plan make the enahancement on Saturday August 25.

8/27/2001 (Keisha Contee) Waiting for Test environment

Log: 9/26/2001 (Keisha Contee) We have a Test environment. Also the Prodcution environment has been upgraded to Oracle 8.1.7.

12/3/01 (Bob Audet) Set this issue to Postponed since the file layout change may not changed until January I spoke with Annie and she will begin gathering requirements from Jeff beginning next Monday, October 1. of 2002. If Chirayu is available, the update prcocess can be completed by October 15.

11/26/01 (Bob Audet) Sent an email to Russell Young to determine all areas where we need to automate the update process. Started this for the object code --> object group --> cost type and organization --> division --> channel relationships. Awaiting feedback from Russell on whether we need to do the same for activity code --> project relationship and object 2, 3, and 4 relationships.

12/03/01 (Bob Audet) Sent another email to CFO Power Users to verify comments made on 11/26/01 and moved issue to 'Needs Clarification'

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ID: 284 - Missing dmp and log file

Request	Prod. Support	**Priority**	High	**Assigned**	Lisa Phillips
Open Date:	11/26/2001 12:30:00 PM	**Requestor**	Lisa Phillips		
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:**	CFO DataMart		

Description

We were missing a log file and a dmp file for 11/25 and 11/11 load data.

Resolution:

Activity

11/26 (9:00am)- Sent Anna Macdonald and email requesting her ftp the files to the directory

11/26 (12:30pm)- Left Anna a voice mail asking her to contact me so I can check the status of the daily cfo loads

11/27 (11:58am)- Received email from Anna stating she is on maternity leave and to contact Michelle Briscoe at 401-8557.

11/27 (12:00pm)- Contacted Michelle and told her we are missing two dump files and to have them ftp'd to the server by eow.

11/29 (9:30am)- Send Michelle an email reminding her to please ftp dmp files for 11/11 and 11/25 data.

11/30/01 (Bob Audet) Moved issue priority to High since the new reports and model will be ported over mid next week and we need to have this data loaded.

11/30 (2:05)- Called Michelle to verify that zero records were on missing dmp files. Michelle will be uploaded files to ftp server.

12/03/01 9:29 A.M. (Bob Audet) Noticed that the 12/01 and 12/02 files were missing. Called Michelle and she will create one file called sfa.Sunday.120201.dmp.Z that will include 12/01 and 12/02. We may need to run the process manually for this date. Confirm with Lisa Phillips.

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FP Data Mart Operations Status

Work Accomplished During This Period
- Completed monthly FP load for October.
- Provided daily monitoring of FP data mart availability.
- Continued tracking SIRs and enhancement requests.
- Completed knowledge transfer for Informatica Load Process

Issues or Anticipated/Current Problems
None

Planned Work for Next Period
- Continue data mart knowledge transfer activities.
- Complete FP monthly batch load for December.
- Continue Microstrategy reporting enhancements.
- Continue to provide daily monitoring of FP Data Mart.
- Continue issue resolution for open FP requests.

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Help Desk Monthly Throughput (FP)

Bug Fix

Category	High	Medium	Low	Total
Carry Forward	1	3	0	4
New	1	2	0	3
Closed	1	2	0	3
End of Month Balance	**1**	**3**	**0**	4

Prod. Support

Category	High	Medium	Low	Total
Carry Forward	0	0	3	3
New	0	0	0	0
Closed	0	0	2	2
End of Month Balance	**0**	**0**	**1**	1

Enhancement Requests

Category	High	Medium	Low	Total
Carry Forward	1	1	5	7
New	0	0	1	1
Closed	0	0	1	1
End of Month Balance	**1**	**1**	**5**	7

Phase II Requests

Category	High	Medium	Low	Total
Carry Forward	0	1	3	4
New	0	0	0	0
Closed	0	1	1	2
End of Month Balance	**0**	**0**	**2**	2

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Help Desk Request Summary (FP)

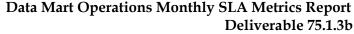**Total Requests: 22**

ID	Status	Request	Title	Priority	DateOpened	DateClosed
230	1	Bug Fix	Login before projects are displayed	High	9/6/2001	
281	5	Bug Fix	FP Report Access problem	High	11/19/2001	11/20/2001
227	1	Bug Fix	Page-by area not working as expected	Medium	6/4/2001	
228	1	Bug Fix	Search for Lender by name	Medium	6/4/2001	
262	5	Bug Fix	Cannot Export to Excel	Medium	9/27/2001	11/1/2001
280	1	Bug Fix	Problem with Part IV	Medium	11/15/2001	
282	5	Bug Fix	Drill Problem on 1189 A Report	Medium	11/20/2001	11/21/2001
78	1	Enhancement	799 Reports	High	6/6/2001	
202	1	Enhancement	Inactive Lender Report	Low	8/22/2001	
203	1	Enhancement	Region Re-Work	Low	8/22/2001	
255	1	Enhancement	Element List Prompts for Documents	Low	9/18/2001	
274	5	Enhancement	Length of Time to keep History (Web)	Low	10/10/2001	11/19/2001
279	1	Enhancement	Use Address Info for Parent Lender	Low	10/31/2000	
283	1	Enhancement	Ahmad Usmani wants view access to the	Low	11/16/2001	
81	1	Enhancement	1189 /1130 Reports	Medium	6/7/2001	
76	5	Phase II	Top 100 Loan Holders - E6	Low	5/22/2001	11/26/2001
80	1	Phase II	Drill to multiple templates in report - E32	Low	7/28/2001	
88	1	Phase II	New Report needed (ED form 799) - E18	Low	6/14/2001	
72	5	Phase II	Lender Scorecard and Other New Reports -	Medium	6/6/2001	11/26/2001
157	1	Prod. Support	Data Mart users loose access when NT	Low	7/18/2001	
238	5	Prod. Support	Cannot export to an excel document	Low	7/10/2001	11/26/2001
269	5	Prod. Support	Needs Microtrategy installed on PC	Low	9/27/2001	11/1/2001

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Help Desk Request Details (CFO)

Total Requests: 22

ID: 72   -   Lender Scorecard and Other New Reports - E2

Request	Phase II	**Priority** Medium		**Assigned**	Robert Audet
Open Date:	6/6/2001 12:00:00 PM	**Requestor** Paul Sullivan			
Target Date:	5/1/2002	**Estimated Effort**	0		
Closed	11/26/2001 12:00:00 PM	**ApplicationType:** FP DataMart			

Description

Need to revise the way that the values are determined for the Lender Scorecard. In addition, reports will be required that show the build up of the summary information that is on the scorecard.

Resolution:

Activity

7/13/2001 (Annie Barton) Waiting for Power Users to meet and discuss this issue. Meeting is to take place in the beg of August.

8/21/2001 (Annie Barton) Meeting with users to define requirements for Lender Score Card.

8/22/2001 (Annie Barton) This enhancement has been moved to Phase II.

11/26/01 (Bob Audet) This enhancement has been assigned to Ahmad Usmani to address in the Phase II requirements gathering.

ID: 76   -   Top 100 Loan Holders - E6

Request	Phase II	**Priority** Low		**Assigned**	Robert Audet
Open Date:	5/22/2001 12:00:00 PM	**Requestor** Harding/Senseney			
Target Date:	5/1/2002	**Estimated Effort**	0		
Closed	11/26/2001 5:00:00 PM	**ApplicationType:** FP DataMart			

Description

We would like to make changes to the way that the Top 100 Loan Holders report is created. We will need to discuss the requirements in further detail. Collect history for Lender Associations and create this report 'As of' a particular date. Only include those lenders if the associate lender has a balance > 0. Use the parent LID name, city, and state.

Resolution:

Activity

8/21/2001 (Annie Barton) Waiting for Power Users meeting in August.

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8/21/2001 (Annie Barton) Users do not need report for another year and a half. Requires us to collect history on Lender Associations.

9/7/2001 (Annie Barton) This has been moved to Phase II

11/26/01 (Bob Audet) This issue has been given to Ahmad Usmani to discuss with the users.

ID: 78   **-** 799 Reports

Request	Enhancement	**Priority** High		**Assigned**	Mark Mandrella
Open Date:	6/6/2001 12:00:00 PM	**Requestor** Paul Sullivan			
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:** FP DataMart			

Description

There are times when the entire 799 report (and possibly the Lender Search report) needs to be viewed (and possibly printed). It would be nice if this could occur as a single document instead of having to view/print several individual reports. This needs to be further researched. With the current structure of the reports with information in the 'page by' area, this might mean that the 'full report' does not display as expected.

Resolution:

Activity

8/21/2001 (Annie Barton) Waiting to get NT ID approved for Annie. Request may be reassigned to Mark because he has an ED LAN account.

8/21/2001 (Annie Barton) Mark needs to contact Carl Reese to add Mark's User ID to SFA NT001 so that he can create documents.

9/6/2001 (Annie Barton) Mike Duffin contacted me and said users would like enhancement fixed ASAP.

9/18/2001 (Annie Barton) Since Mark has been out and this is a high priority, I have started working on this. I received my NT ID so that Carl can add me to the permissions on the document directory. I contacted Carl notifying him of this request. He added me to the document directory, however, I need access to a frame relay machine. I talked with Josh Nash and he set me up on a frame relay machine. I installed MSTR Desktop on that machine and started working on this enhancement.

11/19/01- Reassigned to Mark.

11/27/01 (Mark Mandrella): currently working to resolve a server issue preventing the creation of documents.

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ID: 80   **-** Drill to multiple templates in report - E32

Request	Phase II	**Priority**	Low	**Assigned**	Robert Audet
Open Date:	7/28/2001 10:00:00 AM	**Requestor**	Susan Haenel-Beck		
Target Date:	5/1/2002	**Estimated Effort**	0		
Closed		**ApplicationType:**	FP DataMart		

Description

Drill to multiple templates for "Consolidation Load Fee Payment Analysis Report"

Resolution:

Activity

8/21/2001 (Annie Barton) Waiting for new release of Microstrategy

8/22/2001 (Keisha Contee) Our Microstrategy Case #137013 for this enhancement has been logged as an enhancement (Log id 127716) on the Microstrategy Side. We need to wait for a release that states, 127716 has been fixed.

11/29/01 (Bob Audet) Called MicroStrategy Technical Services to verify the status of the enhancement. Currently not fix date has been determined by MicroStrategy Technology. Estimated time would be Q2 2002, second release of 7.2. Reassigned to Robert Audet.

ID: 81   **-** 1189 /1130 Reports

Request	Enhancement	**Priority**	Medium	**Assigned**	Mark Mandrella
Open Date:	6/7/2001 12:00:00 PM	**Requestor**	Chiu/Duffin		
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:**	FP DataMart		

Description

For 1189 parts, the selection criteria needs to be entered 9 times to get the 'full report'. There should be a way to view the complete report without having to enter the selection/prompt information multiple times.

Resolution:

Activity

8/21/2001 (Annie Barton) Mark needs to contact Carl Reese to add Mark's User ID to SFA NT001 so that he can create documents.

9/6/2001 (Annie Barton) Mike Duffin contacted me and said users would like enhancement fixed ASAP.

9/18/2001 (Annie Barton) Since Mark has been out and this is a high priority, I have started working on this. I received my NT ID so that Carl can add me to the permissions on the document directory. I contacted Carl notifying him of this request. He added me to the document directory, however, I need access to a frame relay machine. I talked with Josh Nash and he set me up on a frame relay machine. I installed MSTR Desktop on that machine and started working on this enhancement.

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11/19/01- Reassigned to Mark.

11/27/01 (Mark Mandrella): currently working to resolve a server issue preventing the creation of documents.

ID: 88   **-** New Report needed (ED form 799) - E18

Request	Phase II	**Priority** Low		**Assigned**	Robert Audet
Open Date:	6/14/2001 12:00:00 PM	**Requestor** Jerry Wallace			
Target Date:	5/1/2002	**Estimated Effort**	0		
Closed		**ApplicationType:** FP DataMart			

Description

A new report is need to add the information currently available on X200 Inquiry Sheet - Tracking File. This report shows all transactions related to an ED form 799 by LID and quarter

Resolution:

Activity

8/21/2001 (Annie Barton) Need to determine if the data already exists in the data mart. If not, a new Informatica process will need to be created to load the necessary data.

9/7/2001 (Annie Barton) The data does not exist in the data mart so this enhancement will be completed in Phase II or Phase III.

11/29/01 (Bob Audet) Met with the FP Power users yesterday and they still consider this issue most likely a Phase III request. Reassigned to Robert Audet.

ID: 157   **-** Data Mart users loose access when NT patches are installed

Request	Prod. Support	**Priority** Low		**Assigned**	Robert Audet
Open Date:	7/18/2001 10:00:00 AM	**Requestor** Annie Barton			
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:** FP DataMart			

Description

Data Mart users loose access to Microstrategy reports when patches are installed on the NT server.

Resolution:

Activity

7/18/2001 (Keisha Contee) Annie logged problem on the Microstrategy web site. Microstrategy suggested we upgrade to version 7.1.1 and the problem would be resolved. We are currently running version 7.1.1. Annie will continue to investigate the issue.

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11/26/01 (Bob Audet) We tried to add groups in 2-tier mode with server down. Still does not work. Reassigned to Bob.

ID: 202   - Inactive Lender Report

Request	Enhancement	**Priority** Low		**Assigned**	Bob Audet
Open Date:	8/22/2001 10:00:00 AM	**Requestor** Jerry Wallace			
Target Date:	10/22/2001	**Estimated Effort**	0		
Closed		**ApplicationType:**FP DataMart			

Description

He wants a report that shows all of the Lids, State, City, Portfolio Ending Balance, Last Quarterly Filing Date. This should only display Lenders that have NOT filed a 799 in the last 4 quarters, but have filed a 799 in the past 5-8 quarters. Also, we should only include Lenders where the Portfolio Ending Balance is greater than 10,000.

Resolution:

Activity

9/12/2001 (Annie Barton) Started working on this enhancement. I opened an MSTR Tech Support Case (# 133930) dealing with advanced filters. Currently, I am waiting for the Tech Engineer to return my call.

9/20/2001 (Annie Barton) Attempting to find a new solution to get this report developed. Will continue working on this enhancement.

9/27/2001 (Annie Barton) Developed sample report in Test Environment. Contacted Jerry to have him review it.

11/20/01 (Annie Barton) Waiting for Jerry's Response. Sent him a reminder email on 11/19/2001.

11/26/01 (Bob Audet) Reassigned to Bob.

11/01/01 (Annie Barton) Have not heard from Jerry regarding the report. There are actually no results returned because I cannot find a lender that fits that description. So, I sent Jerry another email today asking him if he can find a lender that fits the criteria. If not, does he want to cancel the report?

11/27/01 (Bob Audet) Sent Jerry a follow-up email regarding this issue for further information that Annie Barton requested.

ID: 203   - Region Re-Work

Request	Enhancement	**Priority** Low		**Assigned**	Bob Audet
Open Date:	8/22/2001 10:00:00 AM	**Requestor** Jerry Wallace			
Target Date:	10/22/2001	**Estimated Effort**	0		
Closed		**ApplicationType:**FP DataMart			

Description

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Look at Informatica Load Process and determine how D_Lndr_Regions and D_Lndr_States tables are loaded.... From what source table? Then, after determining that we need to contact the users and see if we have the correct Region---> State mapping and identify if we need to change the source mapping.

Resolution:

Activity

11/19/01- Awaiting clarification from Annie regarding issue- reassiged to Bob

11/29/01 (Bob Audet) Emailed Chirayu Patel to figure out why there are no Informatica sessions that populate the D_LNDR_STATE and D_LNDR_REGION tables even though mappings exist to populate them and the tabels are used in reports. Chirayu said that the FP users provided a file called Contact List, which was used for a one-time load. Spoke with Nettie Harding and she said tha the FP users need to determine if the relationship between region and state should be removed all together. She will discuss this with the users. (Affects 8 reports: Consolidation Loan Rebate Fee, LID, Origination Fees Bought, Origination Fees Sold, Parent/Lender Address Info, Part II/Part V Disbursement Comparison by loan type, SR Consolidation Loan Fee Payment Analysis, and Summarized Origination Fees Reports)

12/03/01 (Bob Audet) Changed Status Option to 'Needs Clarification' since awaiting feedback from power users.

ID: 227 - Page-by area not working as expected

Request	Bug Fix	**Priority** Medium	**Assigned**	Annie Barton
Open Date:	6/4/2001 10:00:00 AM	**Requestor** Nancy Krecklow		
Target Date:		**Estimated Effort**	0	
Closed		**ApplicationType:** FP DataMart		

Description

This was logged as a problem with MicroStrategy. The MicroStrategy case number is: 130845. During testing, we fixed the report that had the problem, however there is the possibility that a user may modify their version of a report to re-create this problem.

Resolution:

Activity

7/10/2001 (Annie Barton) Defect in Microstrategy. Need to wait for new release to fix the problem.

11/29/01 (Bob Audet) Called MicroStrategy Technical Support to gather further information regarding this issue. Tech Support person recommended upgrading to 7.1 sp3 or ideally 7.1 sp4. This issue was fixed in the ASP code version 7.1.312.114. Need to decide if we will upgrade to 7.1 sp4.

ID: 228 - Search for Lender by name

Request	Bug Fix	**Priority** Medium	**Assigned**	Robert Audet
Open Date:	6/4/2001 10:00:00 AM	**Requestor** Nancy Krecklow		

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Target Date:		**Estimated Effort**	0
Closed		**ApplicationType:**	FP DataMart

Description

The users wanted to be able to lookup by a lender name instead of a lender id. Annie put in most of the ability to do this, but then ran into a problem with MicroStrategy. She logged a MicroStrategy case number: 128596. Annie was able to allow a user to lookup a lender by typing in a one-word name, but the problem comes in when trying to search when multiple words are given.

Resolution:

Activity

6/7/2001 (Annie Barton) Paul requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

7/10/2001 (Annie Barton) Defect in Microstrategy. Need to wait for new release to fix the problem.

8/4/2001(Annie Barton) Susan Haenel-Beck requested to search by lender name as well for Consolidation Loan Rebate Fee Report.

11/29/01 (Bob Audet) Called MicroStrategy Technical Support and they fixed confirmed the issue for release 7.2 Beta 1. I recommend that we wait until general availability of 7.2 in Q1 of 2002.

ID: 230   **-** Login before projects are displayed

Request	Bug Fix	**Priority**	High	**Assigned**	Robert Audet
Open Date:	9/6/2001 10:00:00 AM	**Requestor**	Annie Barton		
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:**	FP DataMart		

Description

For security purposes it is better if the user logs in first and then chooses the appropriate project. This method will only display the projects the user can access. With situation, when the users' password expires, they are not prompted to change it and locked out of the project.

Resolution:

Activity

9/6/2001 (Annie Barton) Awaiting a new release in Microstrategy to implement this new procedure.

11/26/2001 (Bob Audet) This issue is linked to issue #229, Assigned to Bob.

11/29/01 (Bob Audet) Emailed the FP Power Users to decide if this issue should be closed since a workaround from Issue #229 was provided and the issue subsequently closed.

12/03/01 (Bob Audet) Moved to 'Needs Clarification' because the FP Power Users need to decide whether this issue can be closed since it is similar to Issue #229 that was closed.

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ID: 238 **-** Cannot export to an excel document

Request	Prod. Support	**Priority** Low		**Assigned**	Bob Audet
Open Date:	7/10/2001 10:00:00 AM	**Requestor** Paul Sullivan			
Target Date:		**Estimated Effort**	0		
Closed	11/26/2001 5:00:00 PM	**ApplicationType:**FP DataMart			

Description

Cannot export to an excel document

Resolution:

Activity

8/3/2001 (Annie Barton) NOT CLOSED!!!   I Replaced some of the code in the ExportOptions.asp file (on line 2); however, now they get an error message that really has no significance… still investigating further.

9/6/2001 (Annie Barton) Paul is the only user having this issue and we are working closely with Microstrategy Tech Support to resolve the problem.

9/17/01 (Annie Barton) Emailed Tech Suport regarding the Tech Support Case #134450. We decided to have Paul install a normal version (w/o the 'IS' extension) of Internet Explorer. I emailed Paul to ask him how much effort would be involved with this request, however he is on vacation until 9/19/01.

11/5/01 (Annie Barton) Contacted Paul to see if we could cose this issue.

11/26/01 (Bob Audet) Paul requested that we close this issue. Need to reopen issue # 262.

ID: 255 **-** Element List Prompts for Documents

Request	Enhancement	**Priority** Low		**Assigned**	Annie Barton
Open Date:	9/18/2001	**Requestor** Annie Barton			
Target Date:	9/18/2003	**Estimated Effort**	0		
Closed		**ApplicationType:**FP DataMart			

Description

The users would like to be prompted only once for the 799, 1189, 1130 document reports. These documents are made up of several reports all containing the exact same prompts. Right now, users are prompted for the same information multiple times for one document. They would like to be prompted only once. They want this prompt be an element list prompt instead of a value prompt.

Resolution:

Activity

9/18/2001 (Annie Barton) I logged this with MSTR Tech Support. They do not have a work around. The only work around is to create a value prompt. This will prompt users only once per document, but the users

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will have to remember the specific GA id, LID, and Quarter. MSTR has logged it as MSTR enh #142588. We will have to wait for the release after MSTR 7.2 (which will probably be in about 2 years)

ID: 262 **-** Cannot Export to Excel

Request	Bug Fix	**Priority**	Medium	**Assigned**	Annie Barton
Open Date:	9/27/2001 12:00:00 PM	**Requestor**	Richard Criswell		
Target Date:		**Estimated Effort**	0		
Closed	11/1/2001 12:00:00 PM	**ApplicationType:**	FP DataMart		

Description

Richard cannot export the reports to excel from his home computer.

Resolution:

Activity

9/27/2001 (Annie Barton) Asked Richard to find out the version number of Internet Explorer on his home computer. He will get back to me tomorrow.

9/28/2001 (Annie Barton) He does not have a customized Internet Explorer. So, that was not the problem. I cannot reproduce his error. Continuing to investigate further.

10/02/01 (Annie Barton) I sent Richard an email asking him if he could export to other formats (besides excel) from his home computer.

11/01/01 (Annie Barton) Sent Richard another email because I never received an answer from him.

ID: 269 **-** Needs Microtrategy installed on PC

Request	Prod. Support	**Priority**	Low	**Assigned**	
Open Date:	9/27/2001 11:00:00 AM	**Requestor**	Nettie Harding		
Target Date:		**Estimated Effort**	0		
Closed	11/1/2001 12:00:00 PM	**ApplicationType:**	FP DataMart		

Description

Nettie needs Microstartegy installed on her PC.

Resolution:

Activity

09/26/2001(Jim Greene) He scheduled to do the install for today.

10/09/2001 (Keisha Contee) Spoke to Annie Barton regarding the status and she siad that Nettie did not have adequate resources on her PC. She will install MSTR on her new PC once she is settled after the move.

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ID: 274   **-** Length of Time to keep History (Web)

Request	Enhancement	**Priority**	Low	**Assigned**	
Open Date:	10/10/2001 12:00:00 PM	**Requestor**	Nettie Harding		
Target Date:		**Estimated Effort**	0		
Closed	11/19/2001 9:00:00 AM	**ApplicationType:**	FP DataMart		

Description

We need to modify the settings in WEB to delete History after 60 days.

Resolution:

Activity

11/19/01- Spoke with Annie- Apperantly there is no way to automatically delete history after 60 days so after speaking with Netty it was decided that we are going to leave the history until it becomes a problem.

ID: 279   **-** Use Address Info for Parent Lender

Request	Enhancement	**Priority**	Low	**Assigned**	Bob Audet
Open Date:	10/31/2000 12:00:00 PM	**Requestor**	Susan Haenel-Beck		
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:**	FP DataMart		

Description

Susan thinks it may be a good idea to use the Parent Lender address information instead of the child lender in the prompt associated with 'Lender Consolidation Loan Rebate Fee Analysis' Report.

Resolution:

Activity

10/31/01 (Annie Barton) I discussed this issue with Susan and she is going to contact Nettie Harding for her input. I am waiting to hear back from Nettie.

11/26/01 (Bob Audet) Users need to decide what they want. Reassigned to Bob.

ID: 280   **-** Problem with Part IV

Request	Bug Fix	**Priority**	Medium	**Assigned**	
Open Date:	11/15/2001 2:15:00 PM	**Requestor**	Susan Haenel-Beck		
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:**	FP DataMart		

Description

There is a problem with the data in Part IV for LID 809479, quarter ending 3/31/99. It seems that the amounts are doubled for this quarter; however, in corresponding Part V, the balance is correct. This is throwing off all of our analysis reports. Please take a look at this to see what may be driving the error.

Resolution:

11/19/01 (Mark Mandrella) - the data in the database is correct; what the report is extracting are records of

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document types ON and SN (Original and Supplemantal Submissions). This particular lender code had a high number of type SN's and made the amount look double. It is yet to be determined if the report should only include type ON.

Activity

11/27/01 (Mark Mandrella) - re-opening this issue for the time being. Susan is meeting this week with some FP people and they may want to change this report in some way to avoid the ON and SN mixup.

ID: 281 **-** FP Report Access problem

Request	Bug Fix	**Priority**	High	**Assigned**	Robert Audet
Open Date:	11/19/2001 2:00:00 PM	**Requestor**	Nettie Harding		
Target Date:		**Estimated Effort**	0		
Closed	11/20/2001 2:00:00 PM	**ApplicationType:**	FP DataMart		

Description

Nettie Harding having Problems accessing FP reports from webb

Resolution:

Activity

Resolved the issue. Changed the privileges on the Schema Objects folder by adding the Everyone group with view object and view children privileges. Tested on the web with Nettie's username and password and the reports work fine.

ID: 282 **-** Drill Problem on 1189 A Report

Request	Bug Fix	**Priority**	Medium	**Assigned**	Robert Audet
Open Date:	11/20/2001 8:00:00 AM	**Requestor**	Nancy Krecklow		
Target Date:	11/21/2001	**Estimated Effort**	2		
Closed	11/21/2001 5:00:00 PM	**ApplicationType:**	FP DataMart		

Description

Nancy tried to drill to Calendar Year on the 1189 A Report in FP and the totals to not add up correctly.

Solution:
- Check the parent/child relationship between D_CALENDAR_YEAR and D_CALENDAR_MONTH
- May need to create a view off D_CALENDAR_MONTH

Resolution:

Add a child attribute to the Calendar Year attribute and modified the Date hierarchy to allow the users to drill to calendar year.

Activity

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ID: 283   - Ahmad Usmani wants view access to the schema objects

Request	Enhancement	**Priority** Low		**Assigned**	Bob Audet
Open Date:	11/16/2001 9:00:00 AM	**Requestor** Ahmad Usmani			
Target Date:		**Estimated Effort**	0		
Closed		**ApplicationType:** FP DataMart			

Description

Due an issue with MicroStrategy only the Administrator can access the schema objects unless the workaround from TN5300-007-0039 is implemented. Tried to implement the workaround for only FP PowerUsers, but did not work when the Everyone user group was also given access to the schema objects

Resolution:

Activity

11/26/01 (Bob Audet) Tried workaround provide by Technote TN5300-007-0039 and it did not work when the Everyone group was added.

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